



Procedures for Ordering IT Goods and Services by In-Scope Executive Branch Agencies

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General Guidance

1. IT goods and services as related to these instructions are defined by the list provided at:

<http://www.vita.virginia.gov/media/vitavirginiagov/supply-chain/pdf/NIGP-code-updates-eff-July-2017.pdf>

In-scope goods and services are those identified in the above list by a “Y” in the “In- Scope to VITA” column. Items with a “N” in the column are defined as out of scope.

(Note: VITA has statutory authority to promulgate regulations to ensure that all procurements of information technology of every description meet the electronic and information technology accessibility standards of the Rehabilitation Act of 1973 (29 U.S.C. §794d), as amended. Therefore, any procurement for IT goods or services exceeding \$250K are required to be routed through VITA in eVA.)

A summary of VITA’s procurement delegation can be found at <https://www.vita.virginia.gov/supply-chain/scm-policies-forms/summary-of-vitas-procurement-delegation/>

The IT Consumables list is a listing of in-scope IT goods and services that have been delegated to the agency for procurement up to \$250,000. **Note: Procurements between \$200,000 and \$250,000 must be completed using competitive sealed bidding and competitive negotiation.** These goods can be procured by the agency without coming through VITA. The IT Consumables list can be found at the following link:

<https://www.vita.virginia.gov/media/vitavirginiagov/supply-chain/pdf/VITA-IT-Consumables-List.pdf>

Note: All orders to VITA for in-scope goods and services must be received in eVA. See “Receiving Orders” listed on page 13 below for detailed instructions.

2. Orders for In-Scope Non-Infrastructure IT Goods which includes Items on the IT Consumables List:

A) With the exception of Cloud Services, Agencies have been delegated procurement authority for in-scope non-infrastructure IT goods and services up to \$250,000 and can order these goods and services without routing the requisition to VITA. **Note: Procurements between \$200,000 and \$250,000 must be completed using competitive sealed bidding and competitive negotiation.** All agencies have \$0 delegated authority for Cloud Services (Software as a Service (“SaaS”), Platform as a Service (“PaaS”), Infrastructure as a Service (“IaaS”) and anything as a service or (“XaaS”). The below rules apply to in-scope, non-infrastructure purchases of IT goods and services up to \$250,000:

- Enter the appropriate PO category (Note: V-coded order under \$100K will not come to VITA in eVA)
- Appropriate use of agency purchase cards (Pcards) is authorized
- Use of VITA statewide contracts is **mandatory**, if applicable
- Enter the actual Supplier as the Vendor
- Enter the agency’s “Bill-To” address (not VITA)
- Enter the actual order dollar value
- Enter specifications of the product or service required in the description field
- Attach all relevant documentation (quotes, sole source approval; cooperative procurement approval, etc.)

*Note: Cooperative procurements require CIO approval regardless of the dollar amount and agencies have \$0 delegated authority for Cloud Services (Software as a Service (“SaaS”), Platform as a Service (“PaaS”), Infrastructure as a Service (“IaaS”) and anything as a service or (“XaaS”). ALL cooperative procurements and orders for cloud services shall be submitted through VITA in eVA. For these orders under \$250K; ad-hoc the A136-Tech Compliance role into the approval flow to submit the order through VITA. **Procurements between \$200,000-\$250,000 must be competed using competitive sealed bidding or competitive negotiation.***

B) VITA retains procurement authority for in-scope non-infrastructure IT goods and services greater than \$250,000. All such procurements must be routed to or through VITA in eVA. Depending on the agency’s procurement delegation; the below rules apply to in-scope, non-infrastructure purchases of IT goods and services over \$250,000:

- Enter the appropriate “V” PO category (V-code) to route the requisition to VITA for review.
- Use of Pcards is *not* authorized for these orders
- Procurements between \$200,000-\$250,000 must be competed using competitive sealed bidding or competitive negotiation

a. Procurement to be conducted by VITA:

- Enter Virginia Information Technologies Agency as the vendor, with the location of VITA-VITA.
- Enter the requesting agency’s “Bill To” address.
- Enter the estimated dollar value of the requirement.
- Attach specifications for the goods or services requested
- Attach any available vendor quote.
- Enter approved PGR number if applicable

b. Procurement conducted by Agency under an existing statewide contract:

- Use of VITA statewide contracts is **mandatory**, if applicable
- Enter the actual Supplier as the Vendor
- Enter the agency’s “Bill-To” address (not VITA)
- Enter the actual order dollar value
- Enter the VITA statewide contract number in the “Contract Number” field
- Enter specifications of the product or service required in the description field
- Attach all relevant documentation (quotes, etc.)
- Enter the PGR number if applicable

c. Procurement conducted by Agency under one-time VITA delegation authority:

(Note: Agency can request delegation by emailing SCMInfo@vita.virginia.gov)

- Agency conducts procurement using the appropriate procurement method
- Create eVA requisition to the successful vendor
- Enter the agency’s “Bill To” address.”
- Attach a copy of the awarded contract; sole source approval or cooperative procurement approval (requires prior CIO approval) and any other relevant documentation
- Enter the PGR number if applicable

3. Orders for In-Scope Infrastructure IT Goods and Services

VITA retains all procurement authority for purchasing in-scope infrastructure IT goods and services. All orders for in-scope infrastructure IT goods and services, with the exception of items on the IT Consumables List, must be entered in the VITA Service Portal at: <https://vccc.vita.virginia.gov/>

The below rules apply to in-scope infrastructure purchases of IT goods and services:

- Select View catalog under Order Something
- The use of Pcards is **not** authorized for in-scope infrastructure orders.
- Select from the categories on the left (Note: Desktops, Laptops, etc. are located under Personal Computing)
- Select the device (desktop, laptop, etc.) to access the list of items available in the catalog
- Select the desired device to create a new request; fill in the required information in the request form (To the right is a listed; highlighted in red; of required fields).
- Also on the right, you will select the number of items being requested
- Once you have selected your items, select “Add to Cart” or “Order Now”
- Once you select “Order Now”; your request will be submitted and you will receive a request number beginning with REQ
- If you don’t see the item listed in the catalog; select Other Catalog Needs then select General Service Request
- Enter the product or service being requested and a short description; if necessary. You can also attach any requirements documents or quotes received as well
- Select the number of items being requested (To the right is a listed; highlighted in red; of required fields).
- Select “Add to Cart” or “Order Now”
- Once you select “Order Now”; your request will be submitted and you will receive a request number beginning with REQ
- *Note: If you are entering a confirmation order in eVA; the following applies:*
 - i. Enter the item description and the cost from the Request
 - ii. Enter the Request Number from the VITA Service Portal
 - iii. The Supplier should be VITA with the location being VITA-SAIC
- *Note: VITA does not review these orders in eVA so if a request is not submitted in the Service Portal; no action will be taken on the order.*
- If there is a desired vendor, model, etc., provide that information in the description field
- of the Request.
- For more complex items, a Request for Solutions may be required. Choose from one of the listed Request for Solutions options

Note: The purpose of using the “V” PO category (V-code) in the requisition is to route the requisition to VITA if applicable. The use of the “V” PO category (V-code) should add the below approvers to the standard agency eVA workflow:

- ***Tech Compliance Review (Note: for some orders, this role, A136-Tech Compliance may need to be added in the approval flow.) - Centralized review by VITA to determine if the procurement has been submitted correctly and if additional VITA approvals are required (i.e. SCM approval for sole source or cooperative procurement requests; Enterprise Services approval for cloud services and CIO approval for orders submitted under an approved PGR.***
- ***AITR Review - Review by the Agency Information Technology Resource to approve the financial commitment by the agency.***

4. Orders for Out-of-Scope IT Goods and Services: Agencies have been delegated procurement authority for out of scope IT goods and services up to \$250,000 and can order these goods and services directly from the Supplier without routing the requisition to VITA. Procurements between \$200,000-\$250,000 must be competed using competitive sealed bidding or competitive negotiation. VITA retains procurement authority for out of scope goods and services greater than \$250,000. The below rules apply to out of scope purchases of IT goods and services:

a. Out-of-Scope orders less than \$250,000 (Do not route to VITA):

- Enter the appropriate standard PO category
- Appropriate use of agency purchasing cards (Pcard) is authorized.
- Use of VITA statewide contracts is mandatory, if applicable
- Enter the actual Supplier as the Vendor.
- Enter the agency's "Bill To" address.
- Enter the actual dollar value for the order.
- Enter specifications of the product or service required in the description field.

Attach appropriate documentation (quotes, sole source, cooperative procurement, etc.). *Note: All Procurements under Cooperative or GSA contracts and for cloud services, (Software as a Service ("SaaS"), Platform as a Service ("PaaS"), Infrastructure as a Service ("IaaS") and anything as a service or ("XaaS") are required to come to VITA for approval regardless of the dollar value. VITA (A136-Tech Compliance) may have to be added to the approval flow.*

b. Out-of-Scope orders over \$250,000 (All must be routed to or through VITA):

Non-contract Out-of-Scope orders over \$250,000

- Pcards are *not* authorized for these orders
- Use the appropriate "V" PO category (V-code) for each situation outlined below:

i. Procurement to be conducted by VITA:

- Enter Virginia Information Technologies Agency as the vendor; with the location of VITA-VITA.
- Enter the requesting agency's "Bill To" address.
- Enter the estimated dollar value of the requirement.
- Attach specifications for the goods or services requested
- Attach any available vendor quote.
- Enter approved PGR number if applicable

ii. Procurement conducted by Agency under an existing statewide contract:

- Use of VITA statewide contracts is **mandatory**, if applicable
- Enter the actual Supplier as the Vendor
- Enter the agency's "Bill-To" address (not VITA)
- Enter the actual dollar value of the order
- Enter specifications of the product(s) or service(s) required in the description field
- Attach all relevant documentation (quotes, etc.)
- Enter the PGR number if applicable

iii. Procurement conducted by Agency under one-time VITA delegation authority:

(Note: Agency can request delegation by emailing SCMInfo@vita.virginia.gov)

- Agency conducts procurement using the appropriate procurement method
- Create eVA requisition to the successful vendor
- Enter the agency's "Bill To" address
- Attach a copy of the awarded contract; sole source approval or cooperative procurement approval and any other relevant documentation
- Enter the PGR number if applicable

iv. Out-of-Scope sole source orders:

- Enter the "V" PO category.
- Enter the actual supplier as the vendor.
- Enter the agency's "Bill To address."
- Attach the VITA approved sole source document.

5. Receiving Orders: All agency orders for IT goods and services ordered through eVA must be received in eVA by the agency. The actual order to the Vendor/Supplier for the goods or services is placed by VITA based on the request submitted by the agency using the procedures in paragraph 3 above. Receiving on the original request by the agency provides VITA with receipt confirmation so that receiving can be accomplished by VITA on the actual order to the vendor/supplier. It also provides information to allow VITA to properly time the initiation of billing to the agency, as appropriate. The below rules apply to receiving IT orders in eVA:

- When VITA places the order, the AITR and the person who created the purchase request will be advised by an e-mail from the **eVA ORDERS (OrdersEva)** e-mail account that the order has been placed and the anticipated delivery lead time.
- VITA places the agency purchase order number in the "Comment" section at the bottom of the order to assist the agency in cross referencing the VITA purchase order number to the agency's original purchase order number.
- If you cannot cross reference the purchase order number on the packing slip documents from the vendor to your original agency purchase order number, e-mail evaorders@vita.virginia.gov for advice on the appropriate agency order that matches the information received on the packing slip.
- Once the goods or services are inspected and accepted, receiving in eVA should be completed by the agency receiver for the order. (See Receiving Agency Orders for details)
- Upon completion of the receipt in eVA, e-mail evaorders@vita.virginia.gov and advise that receiving is complete. Please note the Receipt#, Vendor, EP#, PR#, items received and any other information relating to the receipt.
- For service requests completed through the VITA Service Portal, please follow the Service Portal procedures for receiving.

6. Status Requests: For eVA orders completed by VITA; send an email to evaorders@vita.virginia.gov. For items submitted through the Service Portal, submit a comment/question through the request on the Service Portal.

IT Ordering Instructions for eVA

The IT ordering instructions are outlined below:

Requisition Creation:

- To login go to <https://eva.virginia.gov/>.
- Click on Buyer Login
- On the login screen, enter your eVA assigned username and password.
- Should you forget your username or password, locate the link below the login; “Forgot eVA Username/Password” and click the link. Follow the instructions for submission. Once you receive the requested information; return to the login screen, enter the information and click “login”.
- On the left side under Go To, click on eMail / eForms in the dropdown.
- On the left side under **Common Actions; Create**; select Requisition to start the process.
- Enter following information:
 - The use of Pcards is not authorized for infrastructure orders. If you have a Pcard tied to your eVA account, ensure the Pcard box is not checked.
 - Title
 - Select the appropriate V-code for the PO Category (i.e. VR1 for routine VITA orders). Note: This inserts the VITA approvals into the requisition workflow. This includes the agency’s AITR. However, if the dollar value is less than \$100K; the A136-Tech Compliance role may need to be added to the approval flow to ensure the request comes to VITA for review/approval. This includes orders such as cloud service and cooperative procurements regardless of the dollar amount.
 - Procurement Transaction Type
 - Do not check the “Send to eProcurement” block.
 - Do not check the “Send PR to Sourcing & Contracting block
 - Do not check the “Confirming Order; Do Not Duplicate block
- Under Line Items, click Add Non-Catalog Item (Note: All in-scope infrastructure goods and services should be created as Non Catalog item).
- **Do not put in-scope infrastructure in eVA. (All request for in-scope infrastructure items must be submitted through the VITA Service Portal.)**
- Enter a full description. Attachments can be added for lengthy descriptions or specifications. If you have a preferred model, vendor, etc., enter that information in the description, comments block or as an attachment.
- A NIGP Commodity Code must be entered. Click on the down arrow, search by word description.
- Click the down arrow for Supplier and select “Search for more...”. In the field type in “Virginia Information%” and click Search. (The % sign is used as a wildcard in the search engine.)
- The results will be two selections for VITA. Select the Virginia Information Technologies Agency with the location of VITA – VITA.
- Add any available supplier part number as appropriate.
- Enter the Contract number if there is an existing contract for the item (If no contract exists or you are not sure of the contract number; leave this field blank).
- Insert a quantity.

- Enter the price for each line item.
- Click on OK and the item will be added to your requisition.
- The end user will verify or complete the agency accounting information for the agency budgetary unit paying for the equipment.
- Note: The eVA system changes implemented for VITA adds additional fields for the required VITA accounting data. These fields have been defaulted for the agency and have been hidden from view with the exception of the VITA Agency Use field for all agencies and the VITA Department field for agencies that purchase for more than one agency code.
- VITA Agency Use Field: This is a free form field for the use by the agency at its discretion. It is not a mandatory field and could be used by the agency to insert a unique code for reconciliation of the VITA monthly bill.
- Agency Ship To addresses can be accessed by clicking the down arrow by the Ship To field. Select the appropriate address.
- Click Next to proceed.
- Note: If you change the default value for the Entity Code, it *does not* automatically change the default value for the VITA Department. It *does* filter the VITA Department code and only allows you to add the proper code through the select box (+).
- **If the default Entity Code is edited on the Add Title screen and the VITA Department is not manually edited on the Edit Accounting screen, the transaction will be rejected when it is submitted and you must go back and change the VITA Department code.**
- **IMPORTANT: The requirement to edit the VITA Department when you change the default Entity code applies to all transactions, not just in-scope “V” coded transactions.**
- At Checkout do a final review and edit of the transaction as required.
- Immediately below the section of the Checkout page shown above there is a comments box as well as the capability to add attachments.
- It is suggested that you click on the Approval Flow box and see who will be required to approve this requisition. (Note: You can ad-hoc additional approvers if necessary but you cannot remove existing approvers.) If the dollar value is less than \$250K; make sure VITA is in the approval flow. If not, add the A136-Tech Compliance role at the beginning of the approval flow.
- Click Submit to start the requisition in the workflow. Upon completion of the final approval, the order will be sent to VITA for processing. VITA will submit an order to the supplier and will bill the agency. VITA will pay the supplier and the agency will pay VITA.

PO Printing Requirement: Approval flow for non-registered eVA vendors or registered vendors that have not signed up for receiving electronic orders

- The last role in the above workflow is for PO Print. This role is used to inform you that this is not an electronic enabled vendor and that you must print the order and send it to the vendor.
- After you submit the requisition, it will go through the approval process and return to the person defined for this approval (the Requester).
- The PO Print approver must approve the order and then wait for the requisition status to change to “Ordered” (approximately 15 minutes). Once the status changes to “Ordered”, go in and open the purchase order (will begin with EP, DO or PCO) and print. Fax, email or mail the printed purchase order to the vendor.

Note: NEVER email your requisition to the vendor. Requisitions sometimes include notes that the vendor is not expected to see. Also, when submitting Infrastructure orders, NEVER email your agency order, with VITA as the vendor, to the real vendor. VITA orders include additional information that vendors should not see.

Re-open Order for Receiving to Create a Change Order: An order that has been fully received or has been closed for receiving must be re-opened for receiving before a change order can be created.

- There may be occasions when you need to re-open a closed order for additional receiving or you need to do a change order to add additional items to the original order. *(Note: An order that has receiving closed can't be changed without re opening for receiving.)*
- To reopen, click on eMail / eForms
- Click on “Manage” (top left corner under “My Home” tab)
- Click on “Receive
- At the Receiving Steps page, enter either the Order ID or Req ID in the Search box and click Search
- You will see “! Note this order is closed for receiving” at the top left corner
- Click on the “Reopen Order” button
- The system opens a new receipt for additional receiving showing the ordered quantity fully received.
- Click Exit.
- Click the Save button to save the receipt for subsequent receiving.
- Return to the Home page.
- Note that the order/requisition is now back in a receiving status.
- Click on the PR being changed
- Note that the order now has the Change Order button.
- Click Change to do a Change Order.
- You may now add items and you can make some edits to the fully received item. You are not able to delete any fully received item on the order.